

CHANGE OF SERVICING AGENT

From: Names(s): _____

Address: _____

To: Insurance/Investment Co. _____

Re: Policy/Account Numbers: _____

Letter of Authority - Request for appointment of a new Financial Adviser

In respect to all policies detailed above and any others you may hold, I/we understand that this will involve the ongoing authority for my/our new Adviser to:

- obtain policy information and request the transfer of servicing rights;
- be responsible for giving financial advice;
- provide ongoing servicing in respect to all policies detailed above and others you may hold

This authority will remain in place until I/we cancel it in writing.

I/We further instruct that the payment of remuneration payable under my/our policies to my/our new and previous Financial Advisers should be as detailed below.

Adviser Commission (Renewal/Trail)

I/We confirm the transfer of any ongoing commission to my/our new Adviser and they have explained the services that will be provided in return for this payment.

Ongoing Adviser Charges

Any Ongoing Adviser Charges (deducted from policies) and paid to the previous Adviser will be stopped.

Ongoing Adviser Charges (deducted from my/our policies) to be paid to my/our new Financial Adviser are to remain at the same level and frequency as those paid to my/our previous Adviser.

The current level of Ongoing Adviser Charges have been fully discussed and agreed with my/our new Adviser.

I/We hereby give authority for the above policy/ies, and any other that I/We may hold with you, to be serviced by:-

Ward Williams Financial Services Limited

Belgrave House, 39-43 Monument Hill
Weybridge, Surrey
KT13 8RN

Please could you supply **Ward Williams Financial Services Limited** with any information relating to this policy/ies that they may from time to time require.

Signature(s): _____

Date: _____